



Virginia Healthcare Workforce Briefs

Indicators from the Bureau of Labor Statistics'
Current Employment Statistics Survey
Series 2: Regional & Sectoral Employment

Series 2, Issue 105

December 2020

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Data in this report are not seasonally adjusted. Self-employed persons, including health professionals in private practice, are not included.

Highlights

- ◆ Data in this series are not seasonally adjusted and exhibit short-term volatility from fluctuations in holidays, weekends, weather and other seasonal factors. Estimates for the most recent month are preliminary.
- ◆ For the third consecutive month, the Rest of Virginia was the main contributor to HC&SA employment growth in the state. In November, this region created 2,600 new HC&SA jobs, a gain that represents a one-month annualized employment growth rate of 25.4%. Richmond's HC&SA sector also made a strong contribution in November with the creation of 600 jobs, while Hampton Roads added 100 HC&SA jobs during the month. On the other hand, Northern Virginia lost 800 HC&SA jobs in November.
- ◆ November's HC&SA employment growth was driven by job gains in Social Assistance and Ambulatory Health Care Services. Social Assistance made the largest contribution with the creation of 1,600 new jobs, which translates into a 30.8% annualized growth rate. At the same time, Ambulatory Health Care Services increased employment by 1,000. However, Hospitals lost 100 jobs in November, while Nursing & Residential Care Facilities experienced no employment change during the month.

Data in Brief

| Not Seasonally Adjusted* | Employment, in Thousands | | | | Growth Rate, Annualized | | |
|---------------------------------|--------------------------|-----------|-----------|-----------|-------------------------|---------|---------|
| | Nov. 2019 | Aug. 2020 | Oct. 2020 | Nov. 2020 | 12 Month | 3 Month | 1 Month |
| Virginia | | | | | | | |
| Total Nonfarm | 4,115.6 | 3,843.6 | 3,909.2 | 3,933.0 | -4.4% | 9.6% | 7.6% |
| Health Care & Social Assistance | 463.6 | 426.0 | 433.5 | 436.0 | -6.0% | 9.7% | 7.1% |
| Hampton Roads | | | | | | | |
| Total Nonfarm | 798.8 | 761.2 | 769.4 | 771.8 | -3.4% | 5.7% | 3.8% |
| Health Care & Social Assistance | 95.4 | 90.5 | 91.5 | 91.6 | -4.0% | 5.0% | 1.3% |
| Northern Virginia | | | | | | | |
| Total Nonfarm | 1,543.9 | 1,438.3 | 1,461.4 | 1,466.5 | -5.0% | 8.1% | 4.3% |
| Health Care & Social Assistance | 139.6 | 121.4 | 124.3 | 123.5 | -11.5% | 7.1% | -7.5% |
| Richmond | | | | | | | |
| Total Nonfarm | 697.9 | 651.7 | 658.4 | 665.5 | -4.6% | 8.7% | 13.7% |
| Health Care & Social Assistance | 87.5 | 81.0 | 81.1 | 81.7 | -6.6% | 3.5% | 9.2% |
| Rest of Virginia | | | | | | | |
| Total Nonfarm | 1,075.0 | 992.4 | 1,020.0 | 1,029.2 | -4.3% | 15.7% | 11.4% |
| Health Care & Social Assistance | 141.1 | 133.1 | 136.6 | 139.2 | -1.3% | 19.6% | 25.4% |

Preliminary estimates are italicized

*Seasonally adjusted data are adjusted by the Bureau of Labor Statistics to account for weather and other seasonal changes. Since the U.S. Bureau of Labor Statistics does not provide seasonally adjusted data at this level, this series uses **non**-seasonally adjusted data exclusively. Seasonal variation may account for some of the variation in time series data. When comparing data in this series to other HWDC series or other publications it is important to note whether the data reported have been seasonally adjusted.

Regional HC&SA Employment Growth, Level

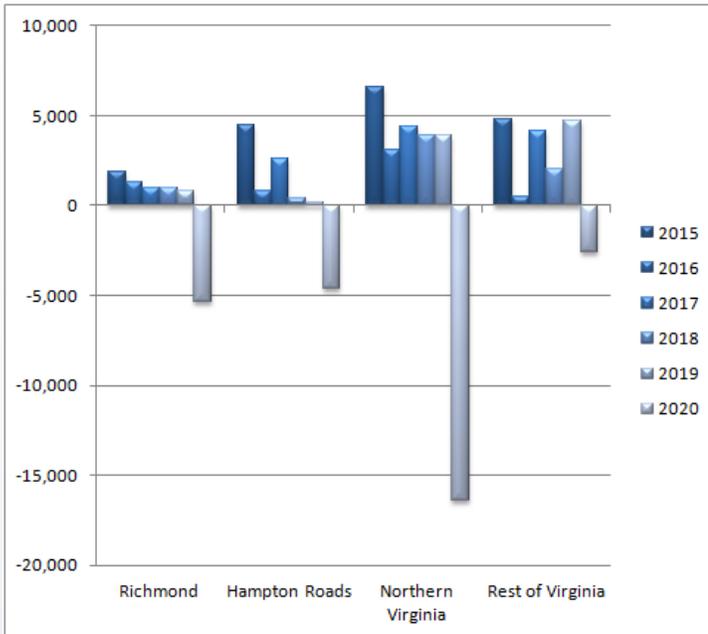


Figure 1: Annual & YTD Change in HC&SA Regional Employment (Not Seasonally Adjusted, Full-Year Change for 2015-2019, Year-to-Date Change for 2020).

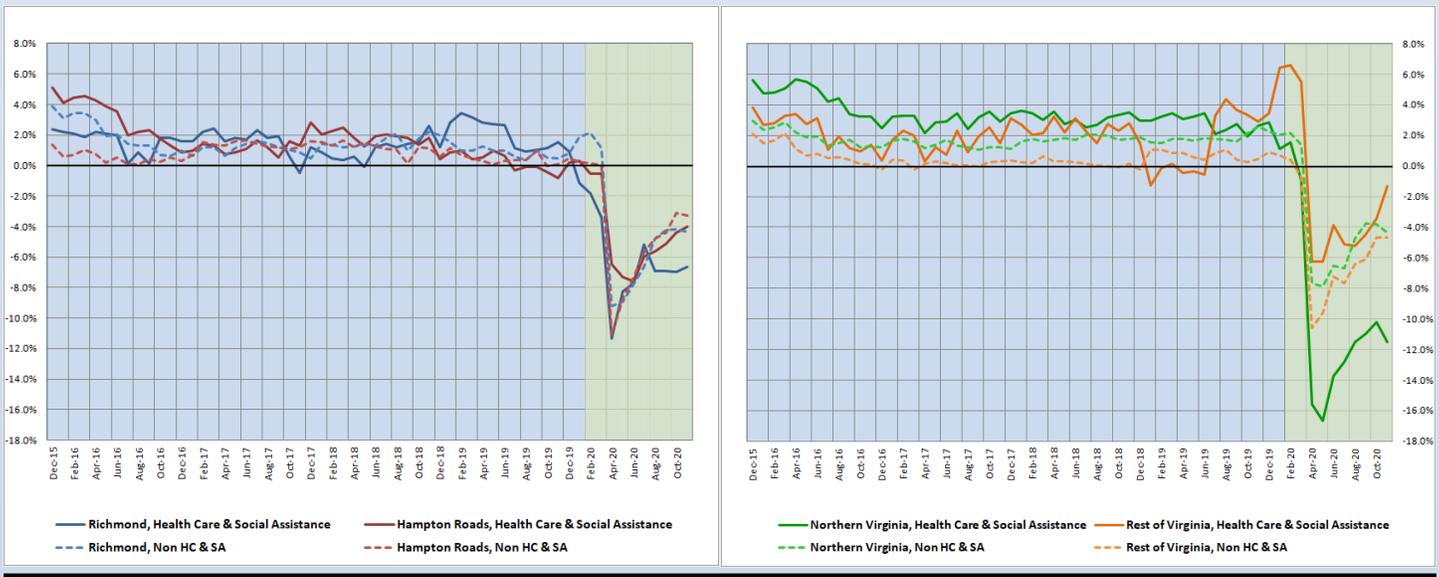
According to the preliminary data released on Friday, December 18, 2020, by the U.S. Department of Labor, Bureau of Labor Statistics, employment growth in Virginia’s Health Care & Social Assistance (HC&SA) sector was once again driven in large part by strong job gains in areas outside of the state’s three major metropolitan statistical areas. In November, the Rest of Virginia created 2,600 new HC&SA jobs, a gain that represents a one-month annualized employment growth rate of 25.4%. This month’s increase continues a recent trend of strong HC&SA job growth in the Rest of Virginia. Over the past three months, this region has increased HC&SA employment by 6,100.

Richmond’s HC&SA sector also enjoyed solid employment growth in November. After increasing HC&SA employment by 500 in October, Richmond created an additional 600 HC&SA jobs in November. Hampton Roads also made a positive contribution to statewide HC&SA employment growth with the addition of 100 new jobs. As for Northern Virginia, this region lost 800 HC&SA jobs during the month.

Year-Over-Year Regional Employment Growth

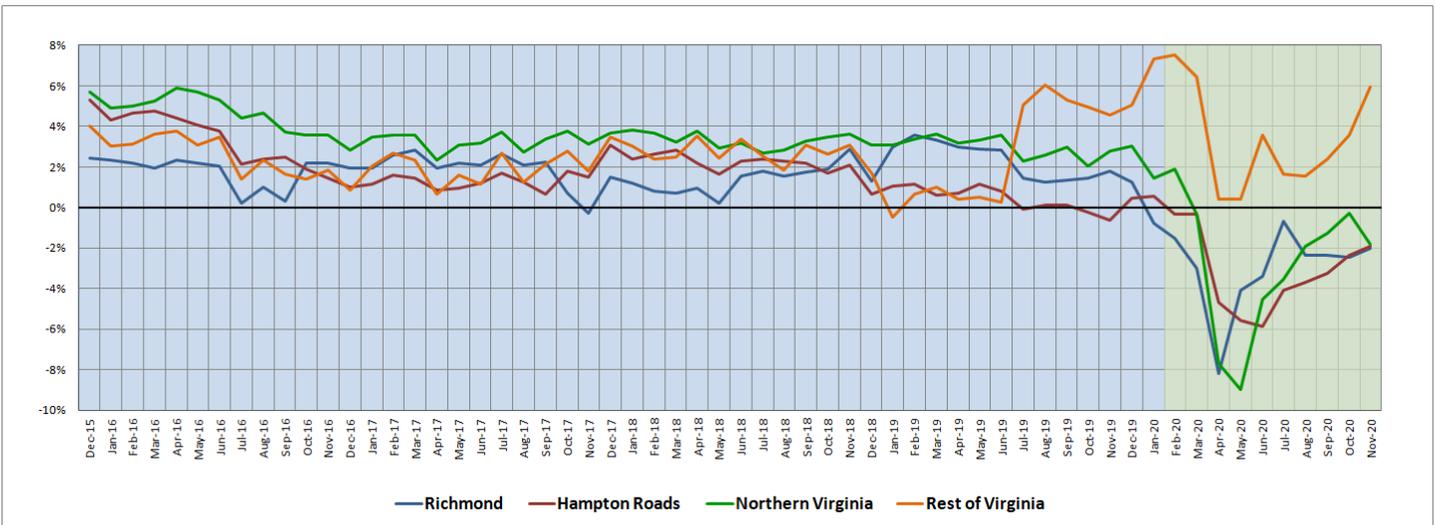
Although long-term HC&SA employment growth in the Rest of Virginia continues to be hampered by the economic dislocations caused by the coronavirus pandemic, this region has enjoyed a significant recovery in its HC&SA job market in recent months. In November, its year-over-year HC&SA employment growth rate increased from -3.46% to -1.35%, thereby reaching its highest level since March. Hampton Roads and Richmond experienced more modest increases of their year-over-year HC&SA employment growth rates to -3.98% and -6.63%, respectively, during the month. On the other hand, Northern Virginia’s HC&SA sector saw its year-over-year employment growth rate fall back to -11.53% in November.

Figure 2: Year-Over-Year Employment Growth (Not Seasonally Adjusted).



12-Month Average Employment Growth by Region

Figure 3: 12-Month Moving Average, HC&SA Regional Employment Growth Rate (Not Seasonally Adjusted).



When measured by its 12-month moving average, long-term job growth in the Rest of Virginia’s HC&SA sector has almost completely recovered from the negative employment effects of the current pandemic. In November, the Rest of Virginia’s HC&SA sector saw its 12-month employment growth rate moving average increase from 3.58% to 5.97%. With this increase, the Rest of Virginia’s moving average is now beginning to approach its current year-to-date high of 7.51% from back in February. As for Hampton Roads and Richmond, these two regions experienced small increases to their own 12-month moving averages in November, but they both still remain negative at -1.92% and -2.03%, respectively. Finally, Northern Virginia’s HC&SA sector experienced a significant reversal in its moving average from -0.26% to -1.79% during the month.

Subsector Employment Growth

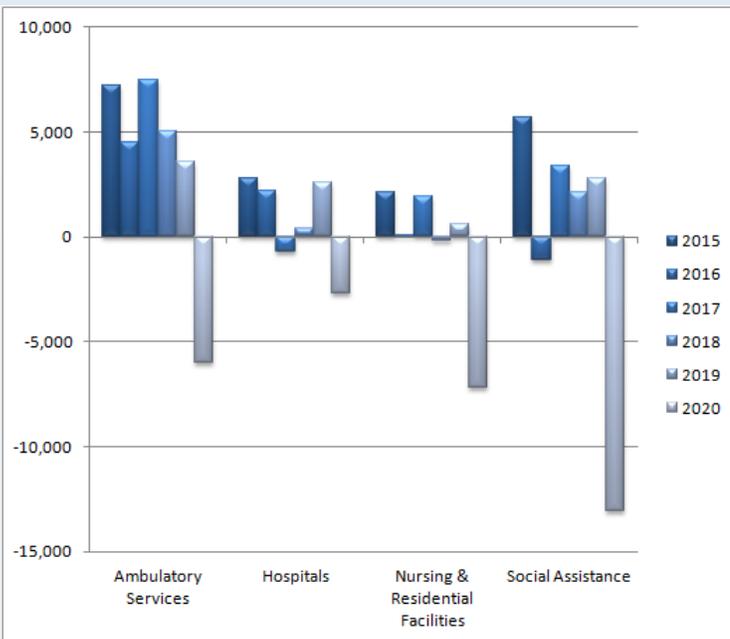


Figure 4: Annual & YTD Change in HC&SA Subsector Employment (Not Seasonally Adjusted, Full-Year Change for 2015-2019, Year-to-Date Change for 2020).

For the second consecutive month, Social Assistance has created 1,600 HC&SA jobs across the state. Thanks to these strong employment gains from October and November, Social Assistance has regained its prior momentum from the summer after experiencing a temporary reversal in September when this HC&SA subsector lost 100 jobs. In total, Social Assistance has created 12,300 jobs since June. However, this recovery has not been enough to overcome the dramatic employment losses from earlier this year. So far in 2020, this subsector has lost 13,100 jobs. This is far greater than the year-to-date employment losses in Virginia’s three other HC&SA subsectors.

Ambulatory Health Care Services enjoyed their third consecutive month of positive employment growth in November with an increase of 1,000 jobs. Over these past three months, Ambulatory Health Care Services have created 6,600 jobs. Finally, Hospitals lost 100 jobs in November, while Nursing & Residential Care Facilities experienced no change in employment during the month.

Distribution of Growth by Subsector

| Not Seasonally Adjusted | Employment, in Thousands | | | | Growth Rate, Annualized | | |
|--------------------------------------------------|--------------------------|-----------|-----------|-----------|-------------------------|---------|---------|
| | Nov. 2019 | Aug. 2020 | Oct. 2020 | Nov. 2020 | 12 Month | 3 Month | 1 Month |
| Virginia | | | | | | | |
| Health Care & Social Assistance | 463.6 | 426.0 | 433.5 | 436.0 | -6.0% | 9.7% | 7.1% |
| <i>Ambulatory Health Care Services</i> | 190.7 | 179.7 | 185.3 | 186.3 | -2.3% | 15.5% | 6.7% |
| <i>Hospitals</i> | 108.4 | 105.8 | 106.1 | 106.0 | -2.2% | 0.8% | -1.1% |
| <i>Nursing & Residential Care Facilities</i> | 78.4 | 71.3 | 71.4 | 71.4 | -8.9% | 0.6% | 0.0% |
| <i>Social Assistance</i> | 86.1 | 69.2 | 70.7 | 72.3 | -16.0% | 19.2% | 30.8% |
| Hampton Roads | | | | | | | |
| Health Care & Social Assistance | 95.4 | 90.5 | 91.5 | 91.6 | -4.0% | 5.0% | 1.3% |
| <i>Hospitals</i> | 22.5 | 22.0 | 22.0 | 21.6 | -4.0% | -7.1% | -19.8% |
| Northern Virginia | | | | | | | |
| Health Care & Social Assistance | 139.6 | 121.4 | 124.3 | 123.5 | -11.5% | 7.1% | -7.5% |
| <i>Ambulatory Health Care Services</i> | 68.4 | 59.3 | 62.5 | 61.2 | -10.5% | 13.4% | -22.3% |
| <i>Hospitals</i> | 26.7 | 25.5 | 25.6 | 25.3 | -5.2% | -3.1% | -13.2% |

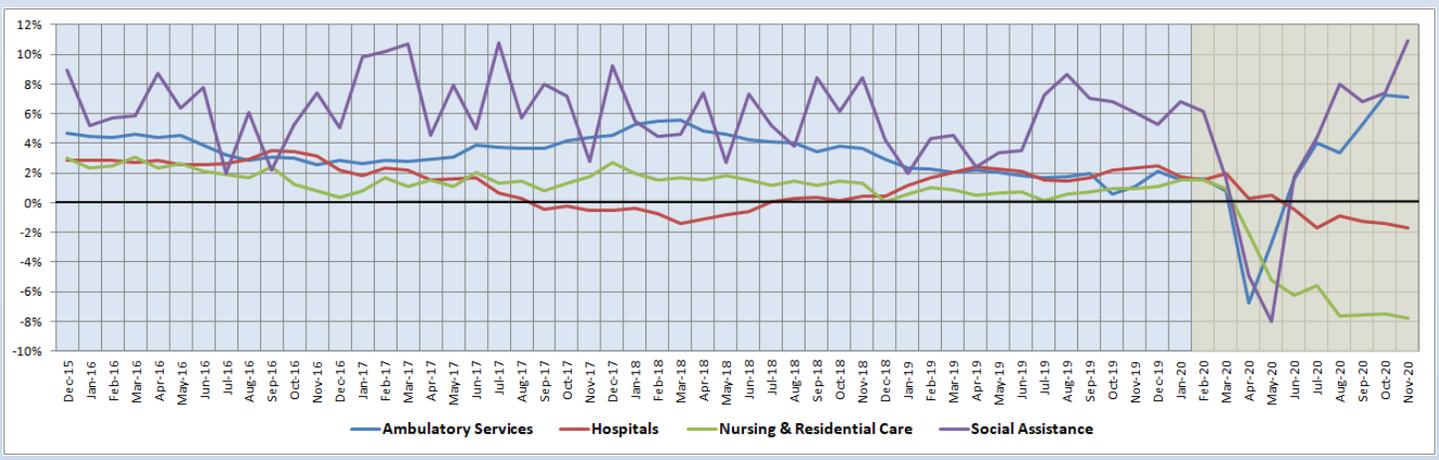
Preliminary estimates are italicized

Social Assistance continues to enjoy very strong short-term employment growth. In November, employment in this HC&SA subsector grew at a 30.8% annualized rate, which is more than four times faster than the overall statewide HC&SA average. In addition, its current three-month annualized employment growth rate of 19.2% is nearly double the comparable 9.7% growth rate for the state's HC&SA sector as a whole. Despite this impressive growth over the past three months, long-term employment growth in Social Assistance remains elusive as this subsector was particularly hard hit by the economic effects of the coronavirus pandemic. In fact, Social Assistance has seen employment fall by 16.0% over the past year.

12-Month Average Employment Growth by Subsector

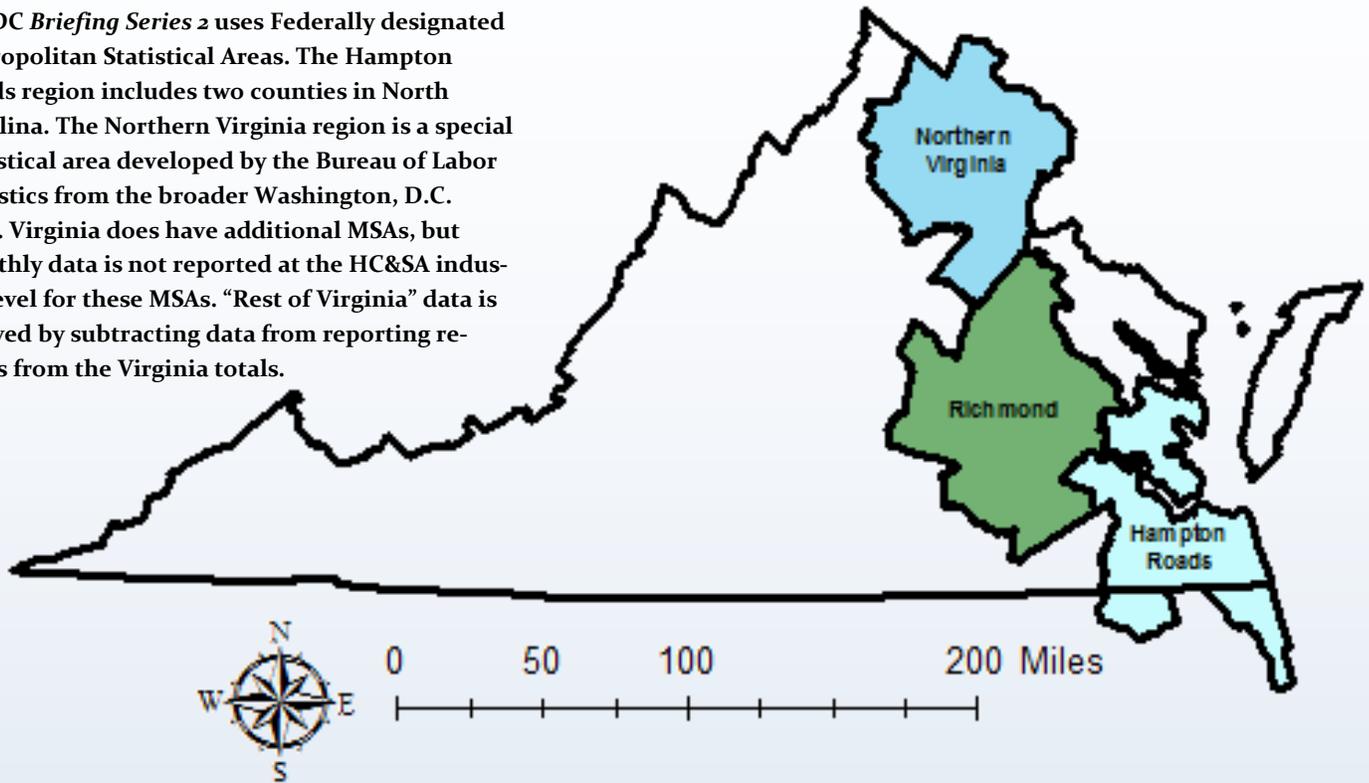
Social Assistance experienced a dramatic spike in its 12-month employment growth rate moving average, surging upward from 7.40% to 10.95% in November. At its current level, this represents the highest value of the 12-month employment growth rate moving average for Social Assistance in more than one decade. Every other HC&SA subsector saw their respective moving averages decline during the month. Despite its strong job gain in November, Ambulatory Health Care Services saw its 12-month employment growth rate moving average dip slightly to 7.11%. Hospitals and Nursing & Residential Care Facilities also experienced small declines in their moving averages to -1.72% and -7.77%, respectively, in November.

Figure 5: 12-Month Moving Average, HC&SA Subsector Employment Growth Rate (Not Seasonally Adjusted).



Region Map

HWDC *Briefing Series 2* uses Federally designated Metropolitan Statistical Areas. The Hampton Roads region includes two counties in North Carolina. The Northern Virginia region is a special statistical area developed by the Bureau of Labor Statistics from the broader Washington, D.C. MSA. Virginia does have additional MSAs, but monthly data is not reported at the HC&SA industry level for these MSAs. “Rest of Virginia” data is derived by subtracting data from reporting regions from the Virginia totals.



Region Detail

| Northern Virginia | | Richmond | | Hampton Roads | |
|---------------------------------------------------|----------------|---------------------------------|------------------|---------------------------------------------------------------|----------------|
| <i>Northern VA, (Non-standard CES Area 94783)</i> | | <i>Richmond, VA (MSA 40060)</i> | | <i>Virginia Beach-Norfolk-Newport News, VA-NC (MSA 47260)</i> | |
| Counties: | Cities: | Counties: | Cities: | Counties: | Cities: |
| Arlington | Alexandria | Amelia | Colonial Heights | Gloucester | Chesapeake |
| Clarke | Fairfax | Caroline | Hopewell | Isle of Wight | Hampton |
| Culpeper | Falls Church | Charles City | Petersburg | James City | Newport News |
| Fairfax | Fredericksburg | Chesterfield | Richmond | Mathews | Norfolk |
| Fauquier | Manassas | Dinwiddie | | Surry | Poquoson |
| Loudoun | Manassas Park | Goochland | | York | Portsmouth |
| Prince William | | Hanover | | | Suffolk |
| Rappahannock | | Henrico | | <i>Currituck, NC</i> | Virginia Beach |
| Spotsylvania | | King William | | <i>Gates, NC</i> | Williamsburg |
| Stafford | | New Kent | | | |
| Warren | | Powhatan | | | |
| | | Prince George | | | |
| | | Sussex | | | |

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About the Data

Data in this report are from the U.S. Department of Labor Bureau of Labor Statistics' Current Employment Statistics program. The CES program surveys about 143,000 businesses and government agencies monthly. Unless otherwise noted, this series uses data that are not seasonally adjusted. Seasonal variations related to weather, holidays, weekends, seasons and other predictable variations are apparent in the data. Short-term changes may be related to seasonal changes rather than underlying trends. Data from recent months is preliminary and subject to revision in future releases from the CES. Revisions will be reported in future editions of this series. Unless otherwise noted, the CES data presented in this series:

Includes:

- ◆ Data on employed individuals drawing a paycheck (payroll employees).
- ◆ All employees, regardless of role, occupation or hours worked.
- ◆ HC&SA employees in the private sector only.
- ◆ Persons employed by health professionals in private practice.
- ◆ Both government and private sector workers in nonfarm employment data.

Does not include:

- ◆ Self-employed workers or volunteers, including health professionals in private practice.
- ◆ HC&SA employees in the public sector. (These are counted as government workers in monthly reports).
- ◆ Information on hours worked or the quality of employment.
- ◆ Government workers in HC&SA level data. (Government workers, regardless of occupation and role, are classified as public sector employees).

The Department of Health Professions Healthcare Workforce Data Center works to improve the data collection and measurement of Virginia's healthcare workforce through regular assessment of workforce supply and demand issues among the 80 professions and 350,000 practitioners licensed in Virginia by DHP.

The HWDC collects data on Virginia's licensed health professionals through surveys completed during the online license renewal and application process. Survey results and data may be accessed on our website: [www.dhp.virginia.gov/
PublicResources/HealthcareWorkforceDataCenter/](http://www.dhp.virginia.gov/PublicResources/HealthcareWorkforceDataCenter/).

The HWDC also provides a series of Virginia Healthcare Workforce Briefs based data collected by the U.S. Department of Labor's Bureau of Labor Statistics and the U.S. Department of Commerce' Bureau of Economic Analysis.

Virginia Healthcare Workforce Briefs:

Series 1: State & National Employment (Monthly)

Series 2: Virginia Regional Employment (Monthly)

Series 3: Income & Compensation (Quarterly)